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**Filtering & Reporting**

**fmPilot**<sup>2</sup>

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## Summary

Reporting in fmPilot 2.0 contains some of the same reports that fmPilot 1.0 contains, with some added functionality. In order to get the most from the reporting module, you will need to understand how filtering works in fmPilot 2.0 works. This is important, because any filters that are created can be used with the reporting module and the reporting and the filtering module function the same.

## Creating a Filter (Work Order)

From the "Filter" dropdown list, the user will be able to select their own filter settings and choose from saved filters. Select "User Filter".

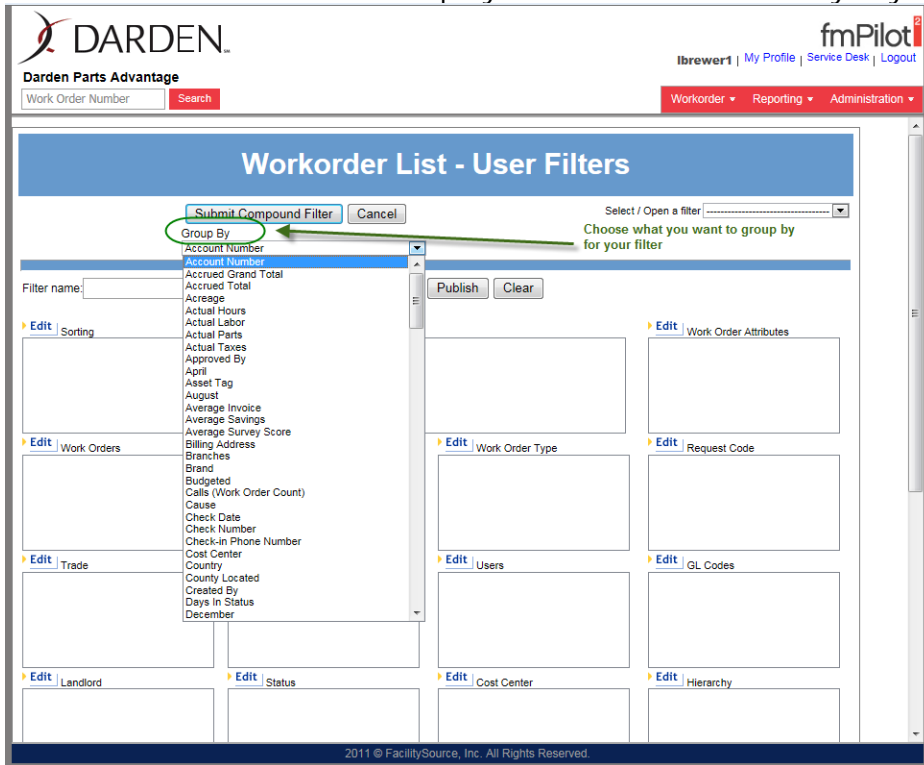
The screenshot shows the 'Darden Parts Advantage' interface. At the top, there's a search bar for 'Work Order Number' and navigation tabs for 'Workorder', 'Reporting', and 'Administration'. A 'Filter' dropdown menu is open, showing 'User Filters' as the selected option. Below the menu is a table of work orders with columns for Location Number, Request Type, Request Code, Priority, and Vendor Name. The table contains five entries, each with details like 'Created', 'Status', 'ETA', 'Location', 'Equipment', 'Request Type', and 'Request Code'. A red arrow points to the 'Filter' dropdown menu.

On this screen you can choose what you would like to filter for.

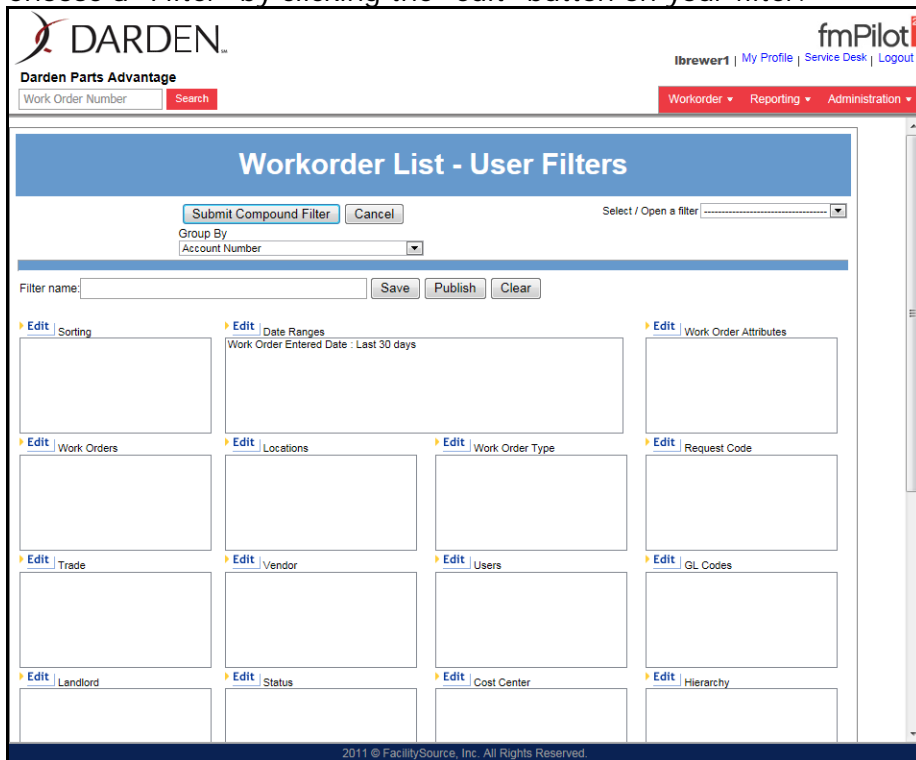
The screenshot shows the 'Workorder List - User Filters' configuration screen. It features a 'Submit Compound Filter' button and a 'Cancel' button. Below these are dropdown menus for 'Group By' (set to 'Account Number') and 'Select / Open a filter'. There are also 'Filter name', 'Save', 'Publish', and 'Clear' buttons. The main area contains a grid of 12 filter categories, each with an 'Edit' link and a text input field:
 

- Sorting
- Date Ranges (Work Order Entered Date: Last 30 days)
- Work Order Attributes
- Work Orders
- Locations
- Work Order Type
- Request Code
- Trade
- Vendor
- Users
- GL Codes
- Landlord
- Status
- Cost Center
- Hierarchy

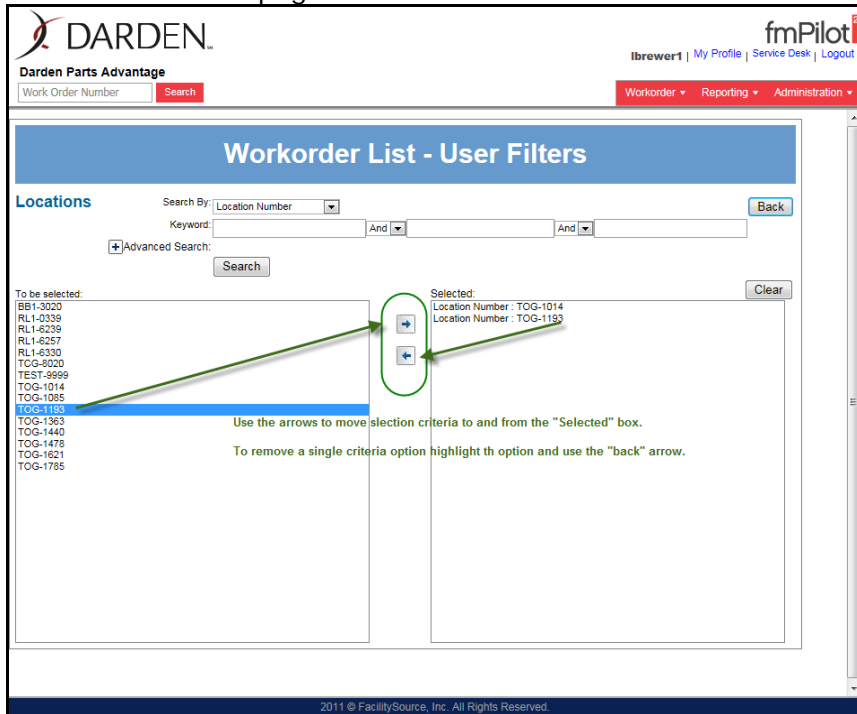
Make a selection from the "Group by" box. This will be what your filter is grouped by.



Choose a "Filter" by clicking the "edit" button on your filter.

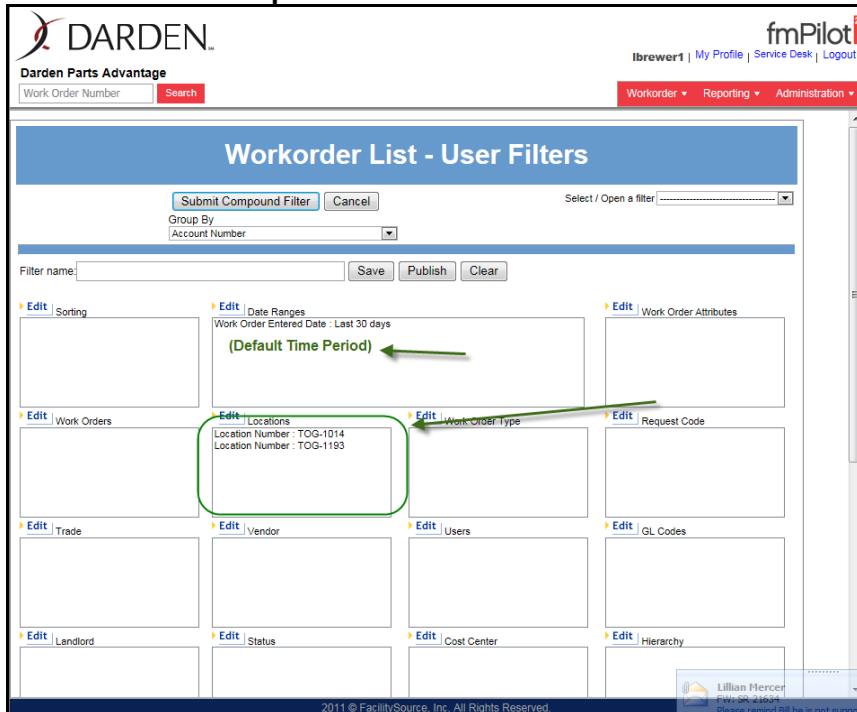


Make your selections inside the filter box. Use the "Back" button when you are ready to return to the filter page.



Once you have returned to the "User Filter" page, you can see the selections that have been made. Note: It will automatically return the last 30 days (date range) unless you change this option.

Click "**Submit Compound Filter**" button to filter.



Our filter returned a list of work orders based on the criteria that was selected (Our example used the last 30 days of work orders and locations TOG-1193 and TOG-1014)

**Darden Parts Advantage**
ibrewer1 | My Profile | Service Desk | Logout

Workorder ▾ Reporting ▾ Administration ▾

Filter ▾ Export ▾ Display Status ▾

WO#	Location Number	Request Type	Request Code	Priority	Vendor Name
<b>WO# WEB-500490</b> Created 7/27/2011 11:14:12 AM PDT Status ▾ 8/18/2011 10:40:42 AM PDT ETA 7/28/2011 12:00:00 AM PDT	Location TOG-1193 LAS VEGAS, NV Equipment None Request Type REFRIGERATION-FRZR UNIT Request Code DOORS	Priority P4 WMATL WTWO			Vendor INDOOR COMFORT SERVICES DNE 500.00 Quote 1 None Quote 2 None Invoice None Walk in cooler door will not close all the way, it has an air
<b>WO# WEB-500506</b> Created 7/29/2011 8:29:26 AM PDT Status ▾ 8/22/2011 3:34:00 PM PDT ETA 7/29/2011 10:28:35 AM PDT	Location TOG-1193 LAS VEGAS, NV Equipment ICE MACHINE Request Type ICE MAKER Request Code NO ICE (CALL TO HAVE ICE DELIVERED)	Priority P2 WCR WTWO			Vendor INDOOR COMFORT SERVICES DNE 500.00 Quote 1 None Quote 2 None Invoice \$330.52 Ice Machine is not making any ice.
<b>WO# WEB-500507</b> Created 7/29/2011 8:31:20 AM PDT Status ▾ 8/2/2011 9:30:16 PM PDT ETA 7/29/2011 10:30:33 AM PDT	Location TOG-1193 LAS VEGAS, NV Equipment ICE MACHINE Request Type ICE MAKER Request Code OTHER	Priority P2 COMP WTWO			Vendor INDOOR COMFORT SERVICES DNE 500.00 Quote 1 None Quote 2 None Invoice \$75.00 unit is icing up. Service requested today.
<b>WO# WEB-500508</b> Created 7/29/2011 8:34:00 AM PDT Status ▾ 8/22/2011 3:33:33 PM PDT ETA 7/31/2011 3:33:13 PM PDT	Location TOG-1014 LAS VEGAS, NV Equipment None Request Type HVAC Request Code REPAIR	Priority P48 WCR WTWO			Vendor INDOOR COMFORT SERVICES DNE 1731.00 Quote 1 None Quote 2 None Invoice \$1,731.00 BILLING PURPOSES ONLY. Installation of 5 ton
<b>WO# WEB-500512</b> Created 7/30/2011 8:18:28 AM PDT Status ▾ 8/2/2011 9:30:13 PM PDT ETA 7/30/2011 7:16:00 PM PDT	Location TOG-1193 LAS VEGAS, NV Equipment PASTA COOKER Request Type PASTA COOKER Request Code WILL NOT TURN ON - OFF	Priority P2 COMP WTWO			Vendor INDOOR COMFORT SERVICES DNE 500.00 Quote 1 None Quote 2 None Invoice \$267.00 Debbie says the pasta cooker doesn't work, won't turn

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## Saving the Filter

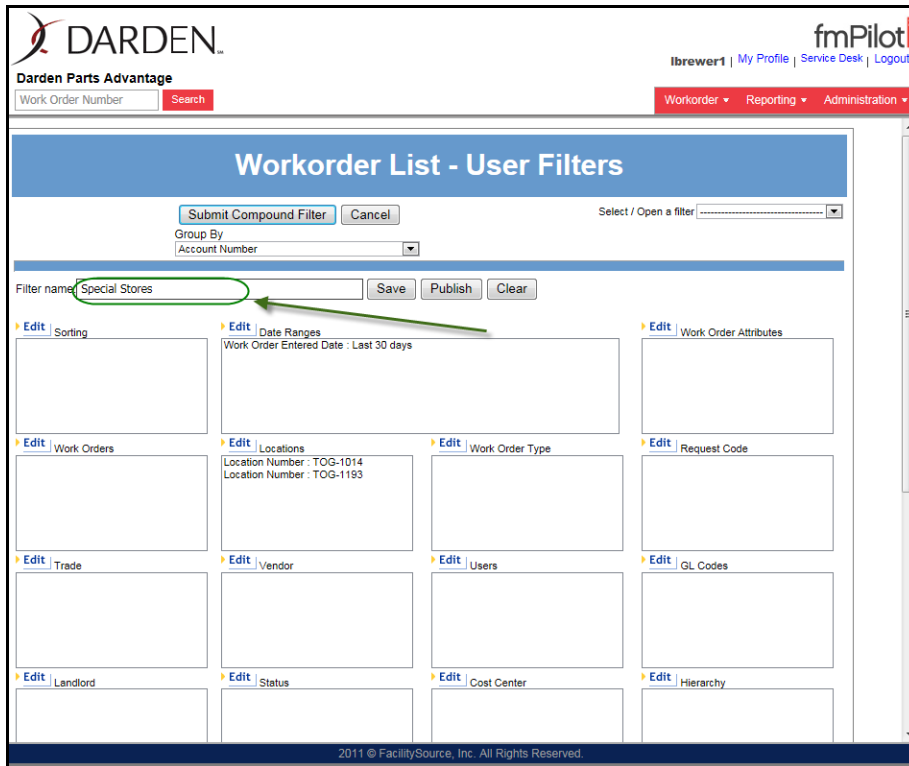
If this is a filter that you will regularly use, you can type in a name in the “Filter Name” box and click save. This will allow you to use the filter over and over and use this filter within the Reporting module.

## Publishing the Filter

You can publish a filter to all other users, by Clicking the publish button. This will allow all users to use this filter.

## Clearing Selections (Filters and reports)

Choose the “clear” button to remove all the selections made





If the filter has been saved or published, it will now appear in the filter dropdown menu.

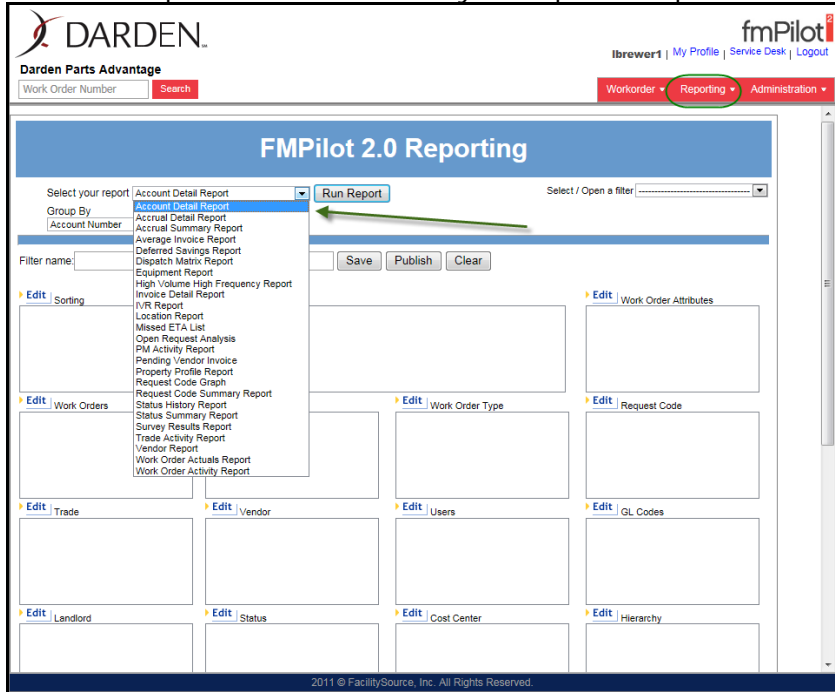
The screenshot shows the 'Darden Parts Advantage' interface. At the top, there's a header with the 'DARDEN' logo and 'fmPilot' branding. Below the header, there are navigation tabs for 'Workorder', 'Reporting', and 'Administration'. A search bar is present for 'Work Order Number'. The main content area is a table of work orders, with a 'Filter' dropdown menu open, showing 'No Filter' selected. The table columns include 'Location Number', 'Request Type', 'Request Code', 'Priority', and 'Vendor Name'. Five work orders are visible, each with a detailed view showing creation and status dates, location, equipment, request type, request code, vendor information, and pricing.

Work Order ID	Location	Equipment	Request Type	Request Code	Vendor	DNE	Quote 1	Quote 2	Invoice
0490	TOG-1193 LAS VEGAS, NV	None	REFRIGERATION-FRZR UNIT	DOORS	INDOOR COMFORT SERVICES	500.00	None	None	None
WEB-500506	TOG-1193 LAS VEGAS, NV	ICE MACHINE	ICE MAKER	NO ICE (CALL TO HAVE ICE DELIVERED)	INDOOR COMFORT SERVICES	500.00	None	None	\$330.52
WEB-500507	TOG-1193 LAS VEGAS, NV	ICE MACHINE	ICE MAKER	OTHER	INDOOR COMFORT SERVICES	500.00	None	None	\$75.00
WEB-500508	TOG-1014 LAS VEGAS, NV	None	HVAC	REPAIR	INDOOR COMFORT SERVICES	1731.00	None	None	\$1,731.00
WEB-500512	TOG-1193 LAS VEGAS, NV	PASTA COOKER	PASTA COOKER	WILL NOT TURN ON - OFF	INDOOR COMFORT SERVICES	500.00	None	None	\$267.00

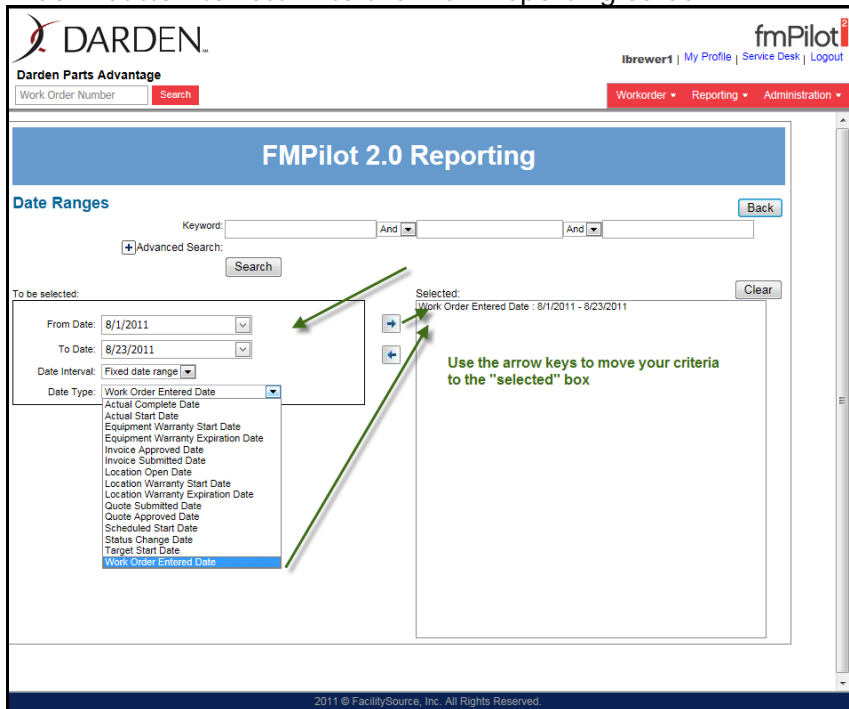
## Reporting

Click on the "Reporting" dropdown option. The "Reporting" screen is the same as the "filter" screen. Selections are made the same way.

Choose a report from the "Select your report" dropdown.



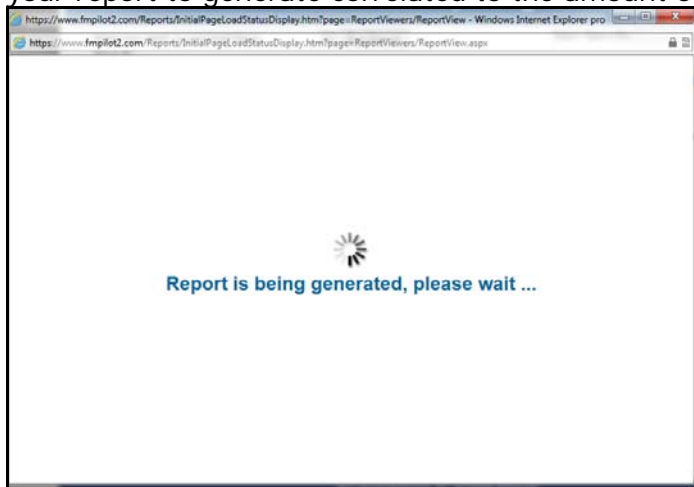
Then choose a filter option (our example chose date range). Once complete, click the "Back" button to return to the main reporting screen.



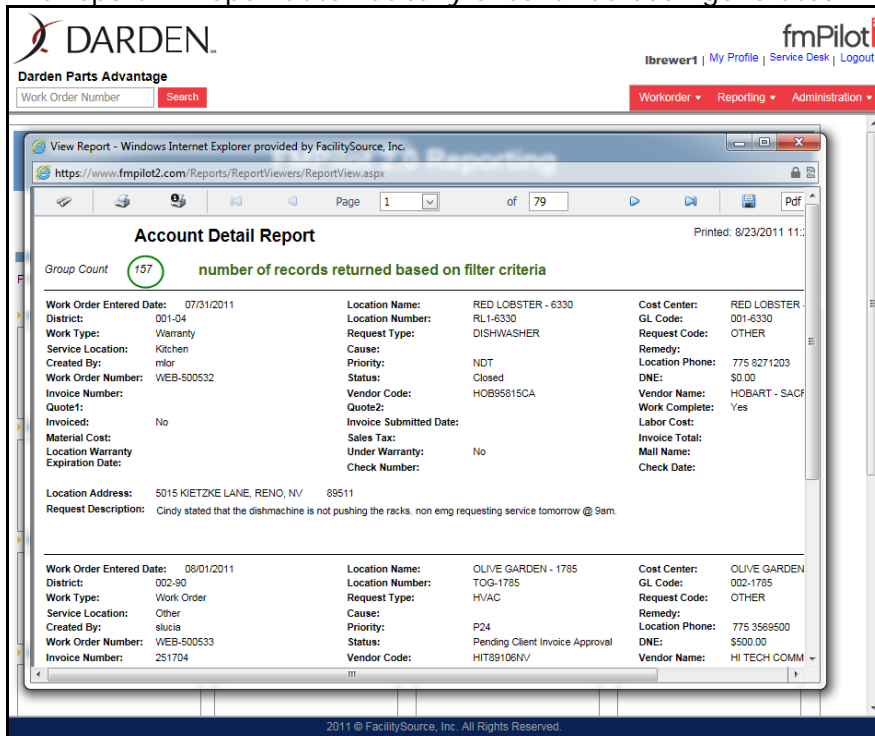
You will be returned to the main Reporting screen and your selections will be displayed. Click "Run Report" to run the report.



You will see this screen as your report is being generated. The length of time it takes for your report to generate correlated to the amount of data that you are asking for.



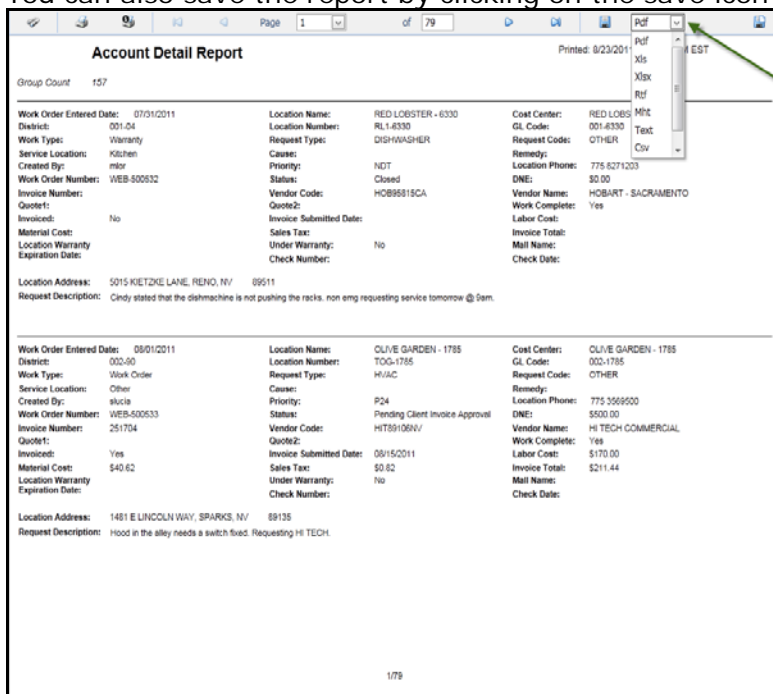
The report will open automatically once it has been generated.



Once your report is generated, it can be exported in many formats. You can then further manipulate the data if you choose.

You can also print the report by choosing the print icon (it tells you at the top how many pages are in the report)

You can also save the report by clicking on the save icon (disk).



## Using Saved Filters

If you have previously created a filter, you may use this filter to create your report. Choose from the Select/Open a Filter drop down ( you can see the filter that was created in the Filter section of this document).

The screenshot displays the FMPilot 2.0 Reporting interface. At the top, there is a header for 'DARDEN.' and 'fmPilot 2.0'. Below this, there are navigation links for 'ibrewer1 | My Profile | Service Desk | Logout' and a menu for 'Workorder | Reporting | Administration'. A search bar is present with the text 'Work Order Number' and a 'Search' button. The main content area is titled 'FMPilot 2.0 Reporting' and contains several sections:

- Select your report:** Includes a dropdown menu for 'Account Detail Report', a 'Run Report' button, a 'Submit Compound Filter' button, and a 'Cancel' button.
- Group By:** Includes a dropdown menu for 'Account Number'.
- Select / Open a filter:** A dropdown menu is highlighted with a green circle and labeled 'Special Stores'. A green arrow points from this menu to a text box below it.
- Text box:** Contains the text 'Previously saved "filters" can be used to run'.
- Filter name:** A text input field with 'Save', 'Publish', and 'Clear' buttons.
- Filter Categories:** A grid of 12 filter categories, each with an 'Edit' link:
  - Sorting
  - Date Ranges (Work Order Entered Date : 8/1/2011 - 8/23/2011)
  - Work Order Attributes
  - Work Orders
  - Locations
  - Work Order Type
  - Request Code
  - Trade
  - Vendor
  - Users
  - GL Codes
  - Landlord
  - Status
  - Cost Center
  - Hierarchy

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